

Fourth Account Current and Report of Conservator and Petition for Allowance of Compensation to Conservator and Attorney

		PUBLIC GUARDIAN , Conservator of the Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 3/27/14 – 3/11/16	<p><u>Note:</u> The Court will set a status hearing for the filing of the Fifth Account as follows:</p> <ul style="list-style-type: none"> • Tuesday, May 1, 2018
		Accounting: \$53,721.57	
		Beginning POH: \$ 2,707.56	
		Ending POH: \$ 3,133.94	
		(\$1,958.94 cash)	
<input type="checkbox"/>	Aff.Sub.Wit.	Conservator: \$778.96 (for 3.76 Deputy hours @ \$96/hr and 5.50 Staff hours @ \$76/hr, itemized at Exhibit B)	
<input checked="" type="checkbox"/>	Verified	Attorney: \$1,250.00 (less than local rule)	
<input type="checkbox"/>	Inventory	Bond fee: \$50.00 (minimum \$25/year)	
<input type="checkbox"/>	PTC	Due to the insufficiency of the estate, Petitioner requests an order imposing a lien against the estate for any unpaid balance of the authorized fees and commissions.	
<input type="checkbox"/>	Not.Cred.	Petitioner requests an order:	
<input checked="" type="checkbox"/>	Notice of Hrg	1. Approving, allowing, and settling the account and report;	
<input checked="" type="checkbox"/>	Aff.Mail	2. Authorizing the Conservator's and Attorney's compensation;	
<input type="checkbox"/>	Aff.Pub.	3. Authorizing payment of the bond fee;	
<input type="checkbox"/>	Sp.Ntc.	4. Imposing a lien against the estate for any unpaid balance of the authorized compensation; and	
<input type="checkbox"/>	Pers.Serv.	5. Issuing any other orders the Court considers proper.	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 4/28/16
Updates:
Recommendation:
File 1 - Pope

Status RE: Arbitration, Filing of Mr. Bickel's Final Account and Temporary Orders/Letters

		NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 4/28/16
		Updates:
		Recommendation:
		File 2- Loeffler

Status RE: Arbitration, Filing of Mr. Bickel's Final Account and Temporary Orders/Letters

			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Per Minute Order 4/28/16
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 3- Loeffler

Status RE: Arbitration, Filing of Mr. Bickel's Final Account and Temporary Orders/Letters

			<div>NEEDS/PROBLEMS/COMMENTS:</div> <div><div>OFF CALENDAR</div><div>Per Minute Order 4/28/16</div></div>
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 4- Loeffler

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr., Beneficiary)
 Attorney Jennifer Walters (for Walter A. Morris, Successor Trustee)

Petition to Compel Accounting by Trustee of the Gary F. Morris, Sr. 2013 Trust and Petition for Distribution of Trust Assets to Doug Standing, Trustee of the Gary Morris, Jr. Trust and Petition for Fees and Costs

DOD: 10/19/2013	GARY MORRIS, JR., Beneficiary, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: Page 5B is a Fee Waiver Review. Continued from 3/15/2016. Minute Order states counsel is in disagreement as to what has been provided. If all of the information has not been provided by 5/3/2016, then Walter Morris is ordered to be personally present or present via CourtCall on 5/3/2016.
	Petitioner states:		
	<ul style="list-style-type: none"> WALTER A. MORRIS was appointed as Successor Trustee of the GARY F. MORRIS, SR., 2013 TRUST on 4/1/2014 [copy of Trust attached as Exhibit A to Declaration of Clerical Error and Omissions filed 10/2/2015]; 		Notes for background: <ul style="list-style-type: none"> Minute Order dated 1/5/2016 from the last hearing states Ms. Walters represents that there have been continued difficulties in obtaining the bank statements, but the accounting is otherwise completed and ready for filing. Ms. LeVan agrees to the accounting being filed without the missing statements; Ms. Walters will proceed with the filing. Court records do not show an accounting has been filed as of 3/10/2016. Order on Ex Parte Petition for Payment of Allowance to Gary Morris, Jr. for Housing Pursuant to Article 2, Section 2.04(D) of the Gary Morris, Sr. Revocable Trust dated 9/3/2013 filed on 1/29/2016 was withdrawn and dismissed on 3/10/2016.
Cont. from 100615, 111715, 010516, 020916, 031516	<ul style="list-style-type: none"> The GARY F. MORRIS, SR., 2013 TRUST terms provide that the balance of the Trust estate, including all assets poured into the Trust as a result of Trustor's death, is to be distributed to BARBARA TURNER, Trustee of the GARY F. MORRIS, JR., TRUST; 		
<input type="checkbox"/> Aff.Sub.Wit.		<ul style="list-style-type: none"> BARBARA TURNER resigned as Trustee of both Trusts, and WALTER A. MORRIS was appointed as Successor Trustee; 	
<input checked="" type="checkbox"/> Verified		<ul style="list-style-type: none"> Petitioner requests the Court compel WALTER A. MORRIS, as Trustee of the GARY F. MORRIS, SR., 2013 TRUST, to distribute the remaining assets in the GARY F. MORRIS, SR., 2013 TRUST to DOUG STANDING, Trustee of the GARY F. MORRIS, JR., TRUST within 30 days of the order approving this petition; 	
<input type="checkbox"/> Inventory		<ul style="list-style-type: none"> GARY F. MORRIS, SR., 2013 TRUST terms provide that the Trustee shall periodically, but not less than once each year, render an account of its administration of the Trust(s) under the Trust instrument to all current income beneficiaries; 	
<input type="checkbox"/> PTC		<ul style="list-style-type: none"> GARY F. MORRIS, SR's., date of death is 10/9/2013 [sic]; WALTER A. MORRIS was appointed as Successor Trustee on 4/1/2014; to date, no accounting has been received from WALTER A. MORRIS. 	
<input type="checkbox"/> Not.Cred.		~Please see additional page~	
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	W /		
<input type="checkbox"/> Aff.Pub.			
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<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/S			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LEG
			Reviewed on: 4/29/16
			Updates:
			Recommendation:
			File 5A – Morris

Petitioner prays the Court Order:

1. An accounting from **WALTER A. MORRIS** from the period when he was Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** from 4/1/2014 until 8/31/2015;
2. **WALTER A. MORRIS**, Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, [shall] distribute all of the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the signed of the order approving this *Petition*;
and
3. Allowing attorney fees and costs to Petitioner to be paid by Walter Morris for failure to file accounting and distribute assets pursuant to **GARY F. MORRIS, SR., 2013 TRUST** terms.

Notes:

- *Petition* was filed using a fee waiver, which is currently pending. The **\$435.00** filing fee is appropriately payable from Trust assets. *Declaration of Clerical Error and Omissions* filed 10/2/2015 states Petitioner agrees that a filing fee should be paid by Walter Morris, Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**; however, Walter Morris is not communicating with the beneficiary, Gary Morris, Jr., his attorney, nor the Successor Trustee of the **GARY F. MORRIS, JR., TRUST**; the beneficiary has no access to funds of the Trust.
- *Order Setting Bond Amount* filed 4/25/2015 set bond at **\$286,000.00**, proof of which was filed on 5/9/2014. *Order Reducing Bond Amount* filed 5/13/2015 finds that the bond amount for **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** is reduced to **\$152,137.88**, which is the amount of net proceeds [distributed to the seller of the Trust real property] plus 10%.
- *Declaration of Clerical Error and Omissions* filed 10/2/2015 attaches as *Exhibit B* a copy of the bond renewal that was mailed to Walter Morris, and states it is unknown what Walter Morris did with it.

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr.)

Fee Waiver Review

DOD: 10/19/2013		NEEDS/PROBLEMS/COMMENTS:
Cont. from 100615, 111715, 010516, 020916, 031516		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed on: 4/29/16
		Updates:
		Recommendation:
		File 5B – Morris

5B

Probate Status Hearing RE: Informal Account of \$10,000.00 Closing Reserve

DOD: 2/27/14	The First and Final Account and Petition for Final Distribution of JANELLE HOVSEPIAN , Administrator, was approved on 8/11/15.	NEEDS/PROBLEMS/COMMENTS:
	The final accounting included a \$10,000.00 closing reserve.	1. Need informal accounting of closing reserve or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from	Pursuant to Local Rule 7.12.6 the Court set this status hearing for the filing of an informal accounting of the \$10,000.00 closing reserve.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 4/28/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 6- McIntire

Attorney Eric R. Brown, of Carmichael (for Petitioner Lee X. Yang, Administrator)

First Account and Report of Status Administration

DOD: 1/16/2014		<p>LEE X. YANG, nephew, was appointed Administrator with Full IAEA Authority without bond on 7/7/2014. Letters issued on 7/23/2014.</p> <p>Account period: 7/23/2014 – 9/16/2015</p> <table> <tr> <td>Accounting</td> <td>-</td> <td>\$319,500.00</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$319,500.00</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$319,500.00</td> </tr> </table> <p>(real property on 489 Silva Ave., Marysville, Yuba County; no cash)</p> <p>Administrator states:</p> <ul style="list-style-type: none"> During the period of administration, all 8 of Decedent's children disclaimed, and written disclaimers were filed with the Court; With all children having disclaimed, the Decedent's surviving spouse, CHA YANG LEE, was the only heir at law claiming an interest in the Decedent's estate; However, Decedent's spouse CHA YANG LEE died on 5/11/2015; Prior to her death, she established the CHA YANG LEE LIVING TRUST dated 4/23/2015 (copy of Trust attached as Exhibit A); the Trustee is the son of Decedent, CHOU DOUA LEE; The CHA YANG LEE LIVING TRUST became irrevocable upon the death of CHA YANG LEE; The CHA YANG LEE LIVING TRUST has not completed administration, nor has any probate proceeding been filed in any Court regarding CHA YANG LEE'S estate; The CHA YANG LEE LIVING TRUST provides a special gift of the Trustor's [CHA YANG LEE'S] interest in the Yuba County real property asset of the estate of NHIA YER LEE to a third party, SAO V. YANG, Settlor's cousin, and PHANG YANG, her husband, or to the survivor of them; <p align="center">~Please see additional page~</p>	Accounting	-	\$319,500.00	Beginning POH	-	\$319,500.00	Ending POH	-	\$319,500.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 7B is the <i>Petition to Determine Ownership</i>.</p> <p>Note: <i>Petition to Allow Late Filing of Claim Against Estate</i> was filed 4/25/2016, and is set for hearing on 6/7/2016.</p> <p>Continued from 3/15/2016. Minute Order states Counsel requests a continuance so that the Court can review the late-filed response to the examiner's notes.</p> <p>Note: Report of Status of Administration filed 2/8/2016 states the estate will not be in a position to be closed until the resolution of the <i>Petition to Determine Ownership</i>; following the Court's ruling on the <i>Petition to Determine Ownership</i>, the Administrator will be in a position to distribute and convey the real property, and the estate will be ready to be closed within less than 30 days thereafter.</p> <p align="center">~Please see additional page~</p>
Accounting	-		\$319,500.00									
Beginning POH	-		\$319,500.00									
Ending POH	-		\$319,500.00									
Cont. from 042315, 110215, 022216, 031516												
✓	Aff.Sub.Wit.											
✓	Verified											
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✓	PTC											
✓	Not.Cred.											
✓	Notice of Hrg											
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	Letters		072314									
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	Objections											
	Video Receipt											
	CI Report											
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	Order	X										
	Aff. Posting											
	Status Rpt											
	UCCJEA											
	Citation											
✓	FTB Notice											
		<p>Reviewed by: LEG</p> <p>Reviewed on: 5/2/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7A - Lee</p>										

Administrator states, continued:

- As Trustee of the Trust, **CHOU DOUA LEE** will petition this Court for an order compelling the Administrator of the Estate of **NHIA YER LEE** to convey the real property asset of the instant probate estate to the special gift beneficiary under the Trust, at such time as when the probate estate is ready to be closed;
- Petitioner believes that a petition under the authority of Probate Code § 850 will be submitted by the Trustee within a reasonable time following the status hearing in this probate matter;
- The estate will not be in a position to be closed until the resolution of the § 850 petition, as yet unfiled, seeking to compel the Administrator to transfer the estate real property asset to the Trust special gift beneficiary;
- Since **CHA YANG LEE** received Medi-Cal benefits at the end of her life, the § 850 petition will be required to provide notice of any hearing to the Director of Health Care Services;
- The Administrator estimates the filing of the § 850 petition within 30 days of the 9/30/2015 Status Hearing, and to have a hearing set on the Court's calendar;
- Following the hearing on the § 850 petition and an order thereon, the Administrator will file a petition for final distribution within 15 days thereafter.

NEEDS/PROBLEMS/COMMENTS, continued:

Note: The probate proceeding of the instant estate initiated on **5/5/2014**, and is represented to contain a sole asset: **100%** fee simple interest in real property in Yuba County located at 489 Silva Ave., Marysville, with title held by Decedent as his sole and separate property. *Petition* states that based upon all 8 children of Decedent having disclaimed their **1/12th** interest in the sole estate asset (the real property in Yuba County), the Decedent's surviving spouse, **CHA YANG LEE**, who died on **5/11/2015**, was the only heir at law claiming an interest in the Decedent's estate. Probate Code § 282(a) provides that the interest disclaimed shall descend, go, be distributed, or continue to be held as if the disclaimant had predeceased the creator of the interest. The effect of the disclaimers, coupled with the subsequent death of Decedent's spouse, is that pursuant to Probate Code §§ 6401 and 6402, the intestate heirs of Decedent's separate property are: (a) the Estate of **CHA YANG LEE** at **1/3** interest; and (b) all of the issue of the Decedent's 8 children at a total of **2/3** interest.

The following issues from the last hearing remain:

1. The Yuba County real property asset of the instant Estate of **NHIA YER LEE** is distributable to the Estate of **CHA YANG LEE** at **1/3** interest, and to all of the issue of the Decedent's 8 children at **2/3** interest, pursuant to the 8 disclaimers by Decedent's children filed on 3/9/2015. *[Note: Assignments executed by the 8 children would have resulted in the entire real property interest passing to the Estate of **CHA YANG LEE**, as it appears was the intent.]* Court records do not show a personal representative has been appointed for the Estate of **CHA YANG LEE** to receive distribution of **CHA YANG LEE'S 1/3** interest in the Yuba County real property.
2. Decedent's grandchildren who succeed to an undivided **2/3** interest in the estate real property are all minors. Local Rule 7.12.4(B) provides that where real property is to be distributed in undivided interests to minors, Petitioner must submit a detailed declaration documenting the need for such distribution and why it would be in the minors' best interests.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

3. Petition states the **CHA YANG LEE LIVING TRUST** was created by Decedent's spouse on **4/23/2015**. (The hearing date for the *First and Final Report of Administrator on Waiver of Account* filed 3/9/2015 for the instant estate was also **4/23/2015**, which was continued by attorney request and no appearance was required on that date.) The Trust lists on its *Schedule of Trust Assets* the same subject real property in Yuba County that is the sole asset of Decedent **NHIA YER LEE'S** estate. It appears the Probate Code § 850 petition that Petitioner states is contemplated by the Trustee of the **CHA YANG LEE LIVING TRUST dated 4/23/2015**, that will seek to convey the real property asset of the instant probate estate to the special gift beneficiary under the Trust, would be an improper petition based upon the fact that the Settlor **CHA YANG LEE** did not own the Yuba County real property or any interest in it on **4/23/2015** when it was purportedly transferred to her trust.

[Verified] Report of Status of Administration verified by Administrator and filed 2/8/2016 states:

- At the previous hearing on 11/2/2015, the Administrator advised the Court that the estate is not yet in a condition to be closed;
- Following the hearing on the *Petition by Administrator to Determine Ownership of Third Party and for Order Authorizing and Directing Conveyance of Real Property from Estate to Third Party* set for 3/15/2016, the estate will be in a condition to be closed;
- At the time of death, Decedent was a resident of Fresno County; he was survived by a spouse **CHA YANG LEE**, and his 8 natural children: **CHOU DOUA LEE, MAYBO LEE, EAGLE LEE, ANNIE LEE, MAI PADO LEE, KHOU LEE, PANA LEE, and LISA LEE**;
- The estate consists of the separate property of Decedent, a single asset parcel of real property on Silva Avenue in Yuba County California [*Decedent resided in and died in Fresno, hence the probate proceeding commenced in Fresno*];
- Decedent's heirs at law are his 8 children; each of his children disclaimed, and the children of each disclaimant, all of whom are the grandchildren of Decedent [*are listed in the chart on the Third Additional Page*];
- Decedent's spouse **CHA YANG LEE**, died 5/11/2015; prior to her death she established the **CHA YANG LEE LIVING TRUST dated 4/23/2015**; the successor and currently acting Trust is **CHOU DOUA LEE**, the son of Decedent and **CHA YANG LEE**;
- If the *Petition by Administrator to Determine Ownership of Third Party and for Order Authorizing and Directing Conveyance of Real Property from Estate to Third Party* set for 3/15/2016 is granted, the Administrator will convey the property [*subject to this proceeding*] to the third party named in the Petition;
- The property is the sole asset of the probate estate, and distribution of the property following the Court's ruling on the Petition will be the final step of administration;
- The estate will not be in a position to be closed until the resolution of the Petition; following the Court's ruling on the Petition, the Administrator will be in a position to distribute and convey the real property, and the estate will be ready to be closed within less than **30 days** thereafter.

Petitioner prays for an Order of the Court that the Report of Status of Administration be allowed and approved as filed.

~Please see additional page~

PROPOSED DISTRIBUTION CHART: Decedent's 8 children disclaimed their interests in the estate property; Decedent's post-deceased spouse and minor grandchildren now succeed to the estate property. For the purposes of determining proper distribution of the instant estate, the names, ages, and relationships to Decedent **NHIA YER LEE** of all of his intestate heirs are as follows:

- 1. One-third interest to Post-deceased spouse of Decedent: CHA YANG LEE**
- 2. Two-thirds interest to minor grandchildren of Decedent:**

Child of Decedent ▶	Grandchild of Decedent	Grandchild of Decedent	Grandchild of Decedent
CHOU DOUA LEE ▶ (disclaimed)	ADEN LEE (age 16)	CALVIN LEE (age 11)	MADELYNN LEE (age 5)
ANNIE LEE ▶ (disclaimed)	KIMBERLINA XIONG (age 11)		
MAI PADO LEE ▶ (disclaimed)	EVELYN XIONG (age 8)	HUNTER XIONG (age 5)	TYTUS XIONG (age 2)
KHOU LEE ▶ (disclaimed)	ALVIN VUE (age 7)	KATARA VUE (age 3)	ELLESAH VUE (age 1)
PANA LEE ▶ (disclaimed)	DILYLAH THAO (age 4)	PAIGE THAO (age 2)	CARTER THAO (age 1)
MAYBO LEE (disclaimed)			
EAGLE LEE (disclaimed)			
LISA LEE (disclaimed)			

Attorney Eric R. Brown, of Carmichael (for Petitioner Lee X. Yang, Administrator)

Petition by Administrator to Determine Ownership of Third Party and for Order Authorizing and Directing Conveyance of Real Property from Estate to Third Party

DOD: 1/16/2014	LEE X. YANG , nephew and Administrator, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: <u>Continued from 3/15/2016.</u> Minute Order states Counsel requests a continuance so that the Court can review the late-filed response to the examiner's notes. <u>Note:</u> Response to Probate Examiner Notes filed 3/4/2016 states the reason for seeking an order transferring estate property to JASON YANG instead of Petitioner's initial request seeking to have the property transferred to the Trust of Decedent's spouse, the CHA YANG LEE LIVING TRUST dated 4/23/2015 , is that seeking an order based on a petition under Probate Code § 850 is in retrospect the correct way to transfer the estate property to JASON YANG , which was the intention of all heirs at law from the outset of probate administration. It should be noted that the intention of all heirs at law for distribution of the Decedent's estate property is not the purpose of a probate proceeding; rather, the purpose is to seek the Court's determination of and authorization for distribution of the estate property of the Decedent to those entitled to receive it pursuant to the Probate Code.
Cont. from 031516			
<input type="checkbox"/> Aff.Sub.Wit.			
✓ Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	w/o		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
✓ Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Petitioner states:

- At the time of Decedent's death on 1/16/2015, he held title to real property on Silva Avenue in Marysville, California (copy of Grant Deed dated 8/15/2011 and recorded on 8/18/2011, reflecting Decedent as grantee of title as his sole and separate property, Attached as Exhibit 1);
- The property has been inventoried as an asset of Decedent's estate;
- **JASON YANG** [any relationship to Decedent or Petitioner unstated] claims the right to title in the property, based on the facts set forth in the Declaration of Jason Yang [attached to the Petition];
- In December 2011, Decedent entered into an oral joint venture business agreement with **JASON YANG** regarding the property;
- The joint venture business agreement was that Decedent would purchase the property, and legal title to the property would be vested in him, although both joint venturers would have an equal ownership interest in the property;
- **JASON YANG** would reside at the property and improve it, including construction repairs, maintenance, and landscaping, using his own funds, and would also pay property taxes and all costs, expenses, and taxes as required;

~Please see additional page~

Petitioner states, continued:

- Decedent and **JASON YANG** planned to sell the property at a point in the future when the residential real estate market improved, and at which [time] it would become profitable, and would then recoup their respective costs and split the remaining profits from the sale proceeds;
- Decedent and **JASON YANG** were raised in the Hmong culture and are part of the larger Hmong community of northern California; a custom among the Hmong community is that joint venture agreements between each other do not involve spouses;
- In the case of the oral joint venture agreement between Decedent and **JASON YANG**, the parties agreed that in the event of one joint venturer's death, the surviving joint venturer would accede to the deceased joint venturer's interest, by right of survivorship;
- Decedent's spouse, **CHA YANG LEE**, agreed to this arrangement, as demonstrated by her execution and recordation of an Interspousal Transfer Deed (*copy of Interspousal Transfer Deed regarding the property executed by Cha Yang Lee on 8/15/2011 and recorded on 8/18/2011 is attached as Exhibit 2*);
- **LEE X. YANG** (Petitioner) and **JASON YANG** spoke on multiple occasions since Petitioner's 7/23/2014 appointment as Administrator of Decedent's estate about conveyance of the property to **JASON YANG**;
- **JASON YANG** advised Petitioner that he claimed title to the property as the surviving joint venturer of the 2011 joint venture agreement between Decedent and **JASON YANG**;
- At the time of Decedent's death, he was survived by his spouse **CHA YANG LEE** and his 8 children: **CHOU DOUA LEE, MAYBO LEE, EAGLE LEE, ANNIE LEE, MAI PADO LEE, KHOU LEE, PANA LEE, and LISA LEE**;
- Decedent's spouse **CHA YANG LEE**, died 5/11/2015; prior to her death she established the **CHA YANG LEE LIVING TRUST dated 4/23/2015**;
- [**CHOU DOUA LEE**, the son of Decedent and **CHA YANG LEE**], who is the Trustee of the Trust, agrees to the conveyance of the property to **JASON YANG** as the Trustee of his mother's Trust, and acknowledges the claim of right to ownership of the property by **JASON YANG** and agrees to the transfer of the property to **JASON YANG**;
- Although each of Decedent's children disclaimed, each of them desire for the property to be conveyed to **JASON YANG**, and would not have executed disclaimers if they had known it would impede the transfer of the property to **JASON YANG**;
- Each of the 8 children of Decedent filed disclaimers; each child has submitted a *Declaration [attached to the instant Petition]* acknowledging the claim of right to ownership of the property by **JASON YANG** and indicating their desire to have the property transferred to **JASON YANG**; each disclaimant indicates the reason they disclaimed was to facilitate the transfer of the property to **JASON YANG**; each disclaimant indicates that they would not have disclaimed if he or she believed it would not have facilitated the transfer of the property to **JASON YANG**;
- The disclaimants who have children do not want their children to have an ownership interest in the property because it would not facilitate Decedent's intent to transfer to **JASON YANG**, and the parents do not want their children to have duties and obligations of owning a fractional interest in real property.
- Petitioner requests pursuant to Probate Code § 850(a)(2)(C) that the Court order Petitioner to convey title to the property to **JASON YANG**.

Petitioner prays for an Order:

1. Determining that **JASON YANG** is the true owner of the property; and
2. Authorizing and directing Petitioner to transfer and convey the property to **JASON YANG**, and to execute any documents necessary in order to fully complete the conveyance.

~Please see additional page~

Declaration of Jason Yang states in brief sum: He resides at the estate real property located in Marysville; in 2011 he entered into an oral agreement with Decedent in which Decedent would purchase the real property and title would be vested in Decedent; he would reside at the property and improve it; we agreed Decedent's spouse would execute an interspousal transfer deed for Decedent to own the property as his sole and separate property; it was his understanding and expectation after Decedent die that he would become the owner of the entirety of the property; he did not know how to ensure that title would become vested in him, so he spoke with Decedent's surviving spouse about the property and she advised him that she was going to inquire about resorting to the jurisdiction of the probate court, but reassured me that she understood that whatever title to the property that Decedent owned would be transferred to him; he spoke to the Administrator/Petitioner many times since his appointment and told Petitioner of the joint venture and that he intended to assert his right to own the property; he asked Petitioner if there was anything he needed to do in order to ensure Decedent's ownership interest in the property would be transferred to him, and Petitioner told him that he was aware of the joint venture agreement and that Decedent's spouse and all of his children were aware also; Petitioner told him that Decedent's spouse and children agreed that he should receive ownership of the property based on his status as surviving joint venture.

Declaration of Chou Doua Lee states in sum: He is the eldest son of Decedent and Decedent's surviving spouse **CHA YANG LEE** and the Trustee of the **CHA YANG LEE LIVING TRUST dated 4/23/2015**; Decedent was the record legal owner of the real property in Marysville; he is in agreement with the Petition seeking an order from this Court to convey title to the property from his father's estate to **JASON YANG**; he was aware of his father's oral joint venture business agreement with **JASON YANG**; it was his understanding that upon future sale of the property, his father and **JASON YANG** would recoup their respective costs and divide the profits from the sales proceeds; he is aware that when his father and **JASON YANG** entered their agreement, they intended that although his father would hold legal title to the property, the parties considered the property to be a jointly owned asset; in the event of one joint venturer's death, the surviving joint venturer would become sole owner of the entirety of the property; he understood that the agreement included that the spouse of either party would not become the owner of the deceased joint venturer's interest through any assertion of community property interest; that is why his mother executed the interspousal transfer deed that pertained to the property; by executing the disclaimers, he and his siblings intended to allow title of the property to be transferred to his mother in the probate action, so that she could transfer title at the end of the probate action to **JASON YANG**; they have since learned that executing the disclaimers was not the way to transfer title to the property to **JASON YANG**, and they would not have executed the disclaimers if they had known that prior to doing so.

Response to Probate Examiner Notes filed by Attorney Eric Brown for Petitioner LEE X. YANG on 3/14/2016, sans legal citations and in brief sum, states:

- A Petition brought under Probate Code § 850 is the appropriate remedy; the Petition does not involve demand for payment, but involves title to Estate property; Probate Code § 9000(b) expressly exempts disputes regarding title to specific property of a decedent from within the definition of a "claim;" the Administrator's instant petition involves **JASON YANG'S** assertion that he is the owner of real property included in Decedent's estate by right of survivorship as a joint venture in the business agreement he and the Decedent had during the Decedent's lifetime, and includes declarations under penalty of perjury from all persons or entities that could possibly assert an ownership interest in the property, and each declarant indicates agreement and a clear desire to have title to the property transferred to **JASON YANG** as the surviving joint venturer;

~Please see additional page~

Response to Probate Examiner Notes filed by Attorney Eric Brown for Petitioner LEE X. YANG on 3/14/2016, sans legal citations and in brief sum, continued:

- **JASON YANG** claims ownership in the property and the Administrator brought his petition under Probate Code § 850 seeking an order which is the appropriate procedure in such circumstances; the distinction between use of the creditor's claim procedure under Probate Code § 9100 et seq. or a petition under § 850 is discussed in *[practice guide cite omitted]*; the Administrator's petition seeks an order determining that **JASON YANG** is the owner of the estate property, and the petition is properly brought under § 850;
- The reason for seeking an order transferring estate property to **JASON YANG** instead of seeking to have the property transferred to the Trust of Decedent's spouse, the **CHA YANG LEE LIVING TRUST dated 4/23/2015**, is that seeking an order based on a petition under § 850 is in retrospect the correct way to transfer the estate property to **JASON YANG**, which was the intention of all heirs at law from the outset of probate administration;
- The relief sought is not based in contract, but is instead based on **JASON YANG'S** assertion that he is the present owner of the property by right of survivorship, and that he became the owner of the property as a result of the Decedent's death, not that he is entitled to specific performance of an unexecuted contract.

Petitioner LEE X. YANG requests that the Court grant his *[Petition by Administrator to Determine Ownership of Third Party [JASON YANG] and for Order Authorizing and Directing Conveyance of Real Property from Estate to Third Party [JASON YANG]*.

8 Jayden Freitas & Beau Freitas (GUARD/P)**Case No. 14CEPR01031****Petitioner** Freitas, Amanda Jean (Pro Per – Mother)**Objectors** Azevedo, Codie (Pro Per – Co-Guardian)**Objector** Azevedo, Nicholas (Pro Per – Co-Guardian)**Petition for Visitation**

Jayden, 13	AMANDA JEAN FREITAS , Mother, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
Beau, 8			
	CODIE and NICHOLAS AZEVEDO , Maternal Aunt and Uncle, were appointed guardians on 1/28/15. Objection filed 03/04/2016		Minute Order of 03/08/2016: The court admonishes the guardians to let Amanda Freitas know about the medical appointments, but Ms. Freitas is not to attend the appointments. Ms. Freitas is to notify the guardians 24 hours ahead of time if she is going to attend a school event in order for the minors to be prepared. This matter is continued to determine the outcome of the hearing in Kings County on 04/14/2016 with regard to the active warrant for Ms. Freitas.
Cont. from 120115, 012616, 030816	<u>Please see petition for details</u>		
<input type="checkbox"/> Aff.Sub.Wit.			The following issues remain: 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on Guardians Codie and Nicholas Azevedo.
✓ Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg		x	
<input type="checkbox"/> Aff.Mail		x	
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order		n/a	
<input type="checkbox"/> Aff. Posting			Reviewed by: LV
<input type="checkbox"/> Status Rpt			Reviewed on: 04/28/2016
<input type="checkbox"/> UCCJEA			Updates:
<input type="checkbox"/> Citation			Recommendation:
<input type="checkbox"/> FTB Notice			File 8 – Freitas

Probate Status Hearing Re: Filing of the First Account

DOD: 1/15/15	DUSTIN C. REYNOLDS was appointed as Administrator with Limited IAEA authority and with bond set at \$20,000.00 on 3/27/15.	NEEDS/PROBLEMS/COMMENTS: 1. Need first account, petition for final distribution, or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from	Bond was filed on 4/22/15.	
Aff.Sub.Wit.	Letters issued on 4/29/15.	
Verified	I & A filed 7/30/15 shows the estate valued at \$155,776.21.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Minute order dated 3/27/15 set this status hearing for the filing of the first account or petition for final distribution.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/28/16
		Updates:
		Recommendation:
		File 9- Reynolds

10 Ayden Mendoza, Julianna Mendoza (GUARD/P) Case No. 15CEPR00477

Guardian: Aneissa Garcia (pro per)

Petitioner: Alexis Garcia (pro per)

Petition for Visitation

		ALEXSIS GARCIA , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: a. Aneissa Garcia (guardian)
		ANEISSA GARCIA , maternal aunt, was appointed guardian on 8/19/15.	
		Please see petition for details.	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 10- Mendoza

11A Benny Markarian (Estate)**Case No. 15CEPR00668**

Attorney Harris, Richard A. (for Pamela Milam – Petitioner – Daughter)

Attorney Nahigian, Eliot (for Ronald Markarian - Son)

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 05/15/2015		PAMELA MILAM , daughter/named executor without bond is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 081815, 092915, 120815, 032216		Petitioner is a resident of Miramar Beach, Florida.	Minute Order of 03/22/2016: Continued per Stipulation and Order filed 03/15/2016.
		Full IAEA – o.k.	
<input type="checkbox"/>	Aff.Sub.Wit.		Page 11B is the Status Hearing for the filing of a Will Contest/Competing Petition.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		<p>1. Proposed personal representative is a resident of Florida. Probate Code 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Tuesday, 06/07/2016 at 9:00a.m. in Dept. 303 for the filing of the Bond if required and • Tuesday, 10/04/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Tuesday, 07/11/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

11A**Dept. 303, 9:00 a.m. Tuesday, May 3, 2016**

11B Benny Markarian (Estate) Case No. 15CEPR00668

Attorney Harris, Richard A. (for Pamela Milam – Petitioner – Daughter)

Attorney Nahigian, Eliot (for Ronald Markarian - Son)

Probate Status Hearing RE: Filing of a Will Contest/Competing Petition

		PAMELA MILAM , daughter, filed a Petition for Probate of Will and for Letters Testamentary with IAEA on 08/18/2015.	NEEDS/PROBLEMS/COMMENTS: As of this Examiner's review on 04/28/2016 no Will Contest/Competing Petition have been filed.
		Minute Order of 09/29/2015 set this Status Hearing for the filing of a Will Contest/Competing Petition.	
Cont. from 120815, 032216			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>	
<input type="checkbox"/>	Verified	<input type="checkbox"/>	
<input type="checkbox"/>	Inventory	<input type="checkbox"/>	
<input type="checkbox"/>	PTC	<input type="checkbox"/>	
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>	
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>	
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>	
<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>	
<input type="checkbox"/>	Conf. Screen	<input type="checkbox"/>	
<input type="checkbox"/>	Letters	<input type="checkbox"/>	
<input type="checkbox"/>	Duties/Supp	<input type="checkbox"/>	
<input type="checkbox"/>	Objections	<input type="checkbox"/>	
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>	
<input type="checkbox"/>	CI Report	<input type="checkbox"/>	
<input type="checkbox"/>	9202	<input type="checkbox"/>	
<input type="checkbox"/>	Order	<input type="checkbox"/>	
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>	
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>	
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>	
<input type="checkbox"/>	Citation	<input type="checkbox"/>	
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>	
			Reviewed by: LV
			Reviewed on: 04/28/2016
			Updates:
			Recommendation:
			File 11B – Markarian

11B

12A Bee Pha (Estate)**Case No. 15CEPR01097****Attorney: Mark J. Castro (for Petitioner Neng Vang)****Petition for Letters of Administration; Authorization to Administer Under the Independent Administration of Estates Act with Limited IAEA Authority.**

DOD: 3/5/15		NENG VANG is petitioner and requests BEE PHA be appointed Executor with bond set at \$10,000.00. Limited IAEA - Decedent died testate or intestate? (see #2) Residence: Fresno Publication: NEED Estimated value of the Estate: Real property - \$150,000.00 Probate referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: Continued from 2/9/16. Minute order states Counsel Represents that he is awaiting the outcome of litigation, and that there is a trial date of 2/17/16 for said litigation. The court admonishes that an amended petition is still necessary. <u>NEED AMENDED PETITION</u> based on but not limited to the following: 1. #2b(1) of the Petition requests Bee Pha be appointed as Executor. It is unclear who Bee Pha is. It appears that this may be the decedent and the name was placed there in error. 2. Petition does not indicate whether or not the decedent died testate or intestate. #3d or 3e of the petition. 3. #2b(1) of the petition requests appointment as executor. #3f(2)(a) requests appointment as administrator. Need clarification. 4. Need date of death of spouse. Local Rule 7.1.1D. 5. #5a(3) or 5a(4) of the petition was not answered re: registered domestic partner. 6. #5a(5) or 5a(6) of the petition was not answered re: child/no child. 7. Petitioner Neng Vang and proposed personal representative Bee Pha are not listed at #8 of the petition as required. 8. Need Affidavit of Publication. 9. Need Notice of Petition to Administer the Estate with proof of service on all interested parties. 10. Need Duties and Liabilities and supplement to the Duties and Liabilities. 11. Need orders and letters	
Cont. from 121515, 020916				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Pub.			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Duties/Supp	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: KT
Reviewed on: 4/28/16
Updates:
Recommendation:
File 12A - Pha

Probate Status Hearing RE: Filing of an Amended Petition

DOD: 3/5/15	NENG VANG filed a Petition for Probate and requested BEE PHA be appointed Executor with bond set at \$10,000.00.	NEEDS/PROBLEMS/COMMENTS:
	The petition had a lot of deficiencies (see page 12A). The Court set this status hearing for the filing of an amended petition.	<p>Continued from 2/9/16. Minute order states Counsel Represents that he is awaiting the outcome of litigation, and that there is a trial date of 2/17/16 for said litigation. The court admonishes that an amended petition is still necessary.</p> <p>1. Need amended petition.</p>
Cont. from 020916		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/28/16
		Updates:
		Recommendation:
		File 12B- Pha

**13A The A. James Doyle, Jr., Trust Dated 4/19/04, Case No. 15CEPR01158
as amended and restated on 5/14/14**

Attorney Burnside, Leigh W. (for Petitioners DeeAnn Doyle Summers and John Doyle)

Petition for Order Compelling Former Co-Trustees to Account and Report

		<p>DEEANN DOYLE SUMMERS and JOHN DOYLE, adult children of settlor, are Petitioners.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 1/26/16:</u> The Court orders Richard Doyle and Tom Borchardt to provide an accounting and report for the period of 5/14/14 through 9/1/15 in the proper format required under the Probate Code and verified under penalty of perjury, and to have the accounting filed by 4/26/16. No appearance is necessary at the status hearing if the petition is filed at least two court days prior; however, if the petition is not filed timely, then Mr. Doyle and Mr. Borchardt are both ordered to be personally present in court on 5/3/16.</p> <p><u>Note:</u> Accounting filed 3/23/16 by Thomas Borchardt and Richard Doyle is set for hearing on 5/5/16.</p> <p><u>Note:</u> On 12/10/15, the Court appointed MARION AUSTIN of Central Valley Fiduciary Services, Inc., as Successor Trustee. Page B is a status hearing re that appointment.</p> <p><u>Note:</u> There are two related matters that also are set for hearing 5/5/16:</p> <ul style="list-style-type: none"> 15CEPR01070 (Conservatorship) (Petition for Attorney's Fees is set for 5/5/16.) 15CEPR01071 (Durable POA) (Ms. Fishinghawk's Accounting was continued to 5/5/16.)
Cont. from 012616		<p>Petitioners state Mr. Doyle's physician, Norman B. Sigel, MD, determined that Mr. Doyle lacked capacity to make decisions regarding his financial affairs since December 2014. See letter attached dated 1/9/15.</p> <p>On 10/30/15, the Fresno County Public Guardian was appointed as temporary conservator of Mr. Doyle's estate in 15CEPR01070.</p> <p>Mr. Doyle created a trust in 2004, naming himself as sole acting trustee and DeeAnn Doyle Summers as first successor trustee and THOMAS BORCHARDT, his longtime accountant and trusted advisor, as second successor trustee. He amended the trust in 2006 to remove his daughter, CHRISTINA FISHINGHAWK, as a beneficiary and left the residue to Petitioners.</p> <p>In April 2012, Mr. Doyle was diagnosed with moderate Alzheimer's disease. His condition gradually worsened and in March 2014 he moved from his home to Orchard Park Senior Living Facility. In November 2014 he was moved to the Memory Care Unit, a locked facility, due to wandering.</p> <p>Petitioners state that approx. two months after he relocated to Orchard Park, Ms. Fishinghawk took Mr. Doyle to the office of Attorney Philip M. Flanigan to sign new estate planning documents. On 5/14/14, Mr. Doyle signed an amended and restated trust agreement, reinstating Ms. Fishinghawk as a 1/3 beneficiary and naming his brother, RICHARD DOYLE, and THOMAS BORCHARDT, as co-trustees.</p>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w		
<input type="checkbox"/>	Aff.Pub.		
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<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p align="center"><u>SEE ADDITIONAL PAGES</u></p>	
		<p>Reviewed by: skc</p> <p>Reviewed on: 4/27/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13A- Doyle</p>	

**13A The A. James Doyle, Jr., Trust Dated 4/19/04, Case No. 15CEPR01158
as amended and restated on 5/14/14**

Page 2

Petitioners state Richard Doyle and Mr. Borchardt began administering the trust thereafter and allege that they sold Mr. Doyle's home and disposed of some of his personal property and established accounts at Charles Schwab in their names as co-trustees.

Petitioners came to learn that their sister, Ms. Fishinghawk, had established several bank accounts at Bank of America in her name and Mr. Doyle's name as co-owners, and allege that all funds in the accounts were the property of Mr. Doyle. Petitioners further came to believe that Ms. Fishinghawk had misappropriate funds from the accounts, and shared their concerns with the co-trustees. After expressing their concerns, Petitioners received a copy of IRS Form 1099 reflecting that Ms. Fishinghawk had received \$109,565 from the trust in 2014, although both co-trustees denied making payments to her or knowing that she had exercised authority over the trust and nontrust accounts and paid monies to herself.

Concerned, Petitioners requested that the co-trustees provide a written accounting of the trust on 2/11/15. Neither co-trustee has responded. Throughout 2015, Petitioners continued to express concerns to the co-trustees, to attorney Flanigan, and to Ms. Fishinghawk concerning management of their father's finances. Petitioners were hopeful that the family members could work out a solution among themselves without involving the court.

On or about 9/1/15, both co-trustees resigned. Presently, there is no successor trustee in place to manage assets of the trust and a vacancy exists that must be filled. Ms. Fishinghawk expressed that she would like to serve as successor trustee, but Petitioners disagree that she would be an appropriate choice. Further, since appointment of the Public Guardian as temporary conservator of Mr. Doyle's estate, Petitioners have been informed that there is very little cash held in his name to which the PG has access, and therefore believe the remaining cash assets are held in trust.

Petitioners respectfully request the Court order that former Co-Trustees, Richard Doyle and Thomas Borchardt, shall present an account and report of their administration of the trust commencing 5/14/14 through 9/1/15, the date of their resignation, and shall file same with the court and serve notice of hearing thereon to all interested persons; and any and all other relief the Court deems just and proper.

**13B The A. James Doyle, Jr., Trust Dated 4/19/04, Case No. 15CEPR01158
as amended and restated on 5/14/14**

Attorney Burnside, Leigh W. (for Petitioners DeeAnn Doyle Summers and John Doyle)

Probate Status Hearing

	DEEANN DOYLE SUMMERS and JOHN DOYLE filed Ex Parte Petition for Appointment of Successor Trustee, or Alternatively, Temporary Successor Trustee on 11/20/15.	NEEDS/PROBLEMS/COMMENTS: Continued from 1/26/16. Nothing further has been filed in connection with this status hearing.
Cont. from 012616	The petition requested that Marion Austin of Central Valley Fiduciary Services, Inc., is appointed successor trustee without bond.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC	The Court set the matter for hearing on 12/10/15.	
Not.Cred.		
Notice of Hrg	On 12/10/15, the Court granted the petition and set this status hearing for review of the proceeding.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 4/27/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13B- Doyle

13B

Petitioner: Victoria Madrid (Pro Per)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 5/3/2016</u>	NEEDS/PROBLEMS/COMMENTS:	
		VICTORIA MADRID, maternal aunt, is petitioner	Minute order dated 3/15/16 states mother represents that petitioner is unable to be present in court because minor is ill. The Court directs the clerk to mail examiner notes to petitioner so she can cure defects before the next hearing. Matter is continued to 5/3/16 for completion of the reciprocal investigation from San Joaquin County. 1. Declarations of due diligence filed on paternal grandmother and paternal grandfather. If Court does not excuse notice need proof of service 15 days prior to the hearing of the <i>Notice of Hearing</i> along with a copy of the petition for appointment <u>or</u> consents and waivers of notice for: a. Gilbert Murrieta (paternal grandfather) b. Dolores Pastore (paternal grandmother) See additional page.	
		Court Investigator report dated 3/10/2016.		
		CI supplemental report filed 4/25/16.		
Cont. from 031516		See petition for details.		
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 4/28/2016	
			Updates:	
			Recommendation:	
			File 14- Guzman	

NEEDS/PROBLEMS/COMMENTS, *continued*:

2. Petition lists four siblings. If siblings are 12 years or older, need proof of service 15 days prior to the hearing of the *Notice of Hearing* along with a copy of the petition for appointment or consents and waivers of notice for:
 - a. Inez Guzman
 - b. Mary Jane Alvarez
 - c. X'ayvier Alvarez
 - d. Lorenzo Guzman-Murrieta

15 Andrew Gonzales, Javier Gonzales (GUARD/P) Case No. 16CEPR00121

Petitioner: Gloria Alice Gonzales (Pro per – Paternal grandmother)

Petitioner: Rudy Gonzales (Pro per – Paternal grandfather)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 5/3/2016</u>	NEEDS/PROBLEMS/COMMENTS:	
		GLORIA GONZALES and RUDY GONZALES , paternal grandparents, are petitioners and were appointed temporary co-guardians on 2/17/16. Court Investigator report filed 3/29/16. <i>See petition for details.</i>	1. UCCJEA indicates minors have lived with petitioners since January 2016, but it does not list minors' residence information for the past five years, as required.	
Cont. from 040516				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 4/28/16	
			Updates:	
			Recommendation:	
			File 15- Gonzales	

Petition for Appointment of Guardian of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<p>1. ICWA-030 Declaration of Mailing indicates the attorney mailed the notice registered or certified on 2/25/16; however, no receipts have been filed pursuant to Cal. Rule of Court 7.1015(c)(5). Need proof of receipt of ICWA-030 by:</p> <ul style="list-style-type: none"> - Paula Kay Williams (Mother) - Steven Cagel (Father) - Sacramento Area Director Bureau of Indian Affairs - Secretary of the Interior - Caddo Tribe <p>2. Need <u>completed</u> proposed order. (Proposed order submitted is incomplete.)</p>
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 16- Cagle

Petition to Determine assets of Decedent as Property of an existing Trust

Kenji Maruko DOD: 6/23/14		WARREN K. MARUKO , Successor Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The legal description attached at Exhibit A appears to be incomplete (missing Page 1). The Court may require verification of the legal description as attached to the order. Note: As a reminder to the attorney, Local Rule 7.6.1.B requires that the signature line provided for the judicial officer shall appear after all exhibits at the end of the complete document. In this instance, Examiner has inserted a signature line at the end of Exhibit A.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<p>Petitioner states Kenji Maruko executed an inter vivos declaration of trust entitled The Maruko Family Trust on 4/24/07 (Exhibit B) and assigned, transferred and delivered to himself as trustee the real property described on Schedule A attached to the Declaration of Trust, including certain real property located at 37641 Auberry Road, Clovis, CA. The property was described twice because there are two separate APNs associated with the same common property address.</p> <p>Kenji Maruko died 6/23/14. Upon his death, Petitioner Warren K. Maruko became the successor trustee.</p> <p>On the date of his death, Kenji Maruko held the real property individually rather than as trustee. Petitioner states the intent to hold the real property in trust is evidenced by the fact that the real property is described on Schedule A.</p> <p>Memorandum of Points and Authorities cites <i>Estate of Heggstad</i>.</p> <p>Petitioner prays for an order adjudging that:</p> <ol style="list-style-type: none"> 1. Kenji Maruko died on 6/23/14, a resident of Fresno County, CA; 2. Kenji Maruko, during his lifetime, created a revocable inter vivos living trust by declaration of trust dated 4/24/07 as trustor and trustee; 3. Warren K. Maruko became the successor trustee upon the death of Kenji Maruko; 4. That despite the vesting of the real property described above, the real property is a part of the trust estate; and 5. Such further orders as the Court deems appropriate. 	
			Reviewed by: skc Reviewed on: 4/28/16 Updates: Recommendation: File 17- Maruko

Petition for Appointment of Probate Conservator

		THERE IS NO TEMPORARY. No temporary was requested.	NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 4/22/16. 1. #1e and 1f of the Petition requests orders relating to Probate Code §1873 or 1901 and §2351-2358 without any explanation. <u>Note:</u> Generally, the powers under this section are part of a general conservator and are only requested if the petitioner wishes the conservatee to retain any of those powers. 2. Petition requests medical consent powers. Need Capacity Declaration. 3. Petition does not state why a conservatorship is necessary (#5c of the petition). 4. Need Conservatorship Video Viewing Certificate. 5. Need Order.
		SILVER KELLEY , sister and HEIDI SIMON , niece, are petitioners.	
Cont. from		Please see petition for details.	
	Aff.Sub.Wit.		
✓	Verified	Court Investigator Report filed on 4/26/16	
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation	W/	
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 18- Eudy

Petition for Appointment of Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 4/1/16 Voting rights affected – need minute order.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc Reviewed on: 4/28/16 Updates: Recommendation: File 19- Chavez	

20 Yalena Martinez, Xzander Martinez & Jesse Frutoz (GUARD/P)
Case No. 13CEPR00759

Petitioner: Deborah Martinez (pro per)
 Petitioner: Leslie Galvan (pro per)
 Petitioner: Hector Galvan (pro per)

Petition for Appointment of Temporary Guardian of the Person

<u>GENERAL HEARING 6/6/16</u>		NEEDS/PROBLEMS/COMMENTS:	
		<p>This petition is as to Yalena only.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on: <ol style="list-style-type: none"> a. Adam Soto (father) 	
DEBORAH MARTINEZ, maternal grandmother, LESLIE GALVAN and HECTOR GALVAN , maternal aunt and uncle, are petitioners.			
Cont. from 041916			
<input type="checkbox"/>	Aff.Sub.Wit.		
✓	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		X
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		X
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
✓	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
✓	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 4/28/16	
		Updates:	
		Recommendation:	
		File 20- Martinez & Frutoz	

Petition for Appointment of Temporary Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on Proposed Conservatee Georgina Caballero.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	X		
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/28/16	
			Updates: 4/29/16	
			Recommendation:	
			File 21- Caballero	

22 Emma Lang (GUARD/E)**Case No. 16CEPR00433****Petitioner Lousberg, Alma D. (Pro Per – Mother)****Petition for Appointment of Temporary Guardian of the Estate**

Age: 11		<u>GENERAL HEARING 06/01/2016</u> ALMA D. LOUSBERG , mother, is petitioner and requests appointment as Guardian of the Estate. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Note: Petitioner filed a Petition to Determine Succession on 04/04/2016, in Probate Case No. 16CEPR00367. The hearing is set for 05/12/2016.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			n/a
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			n/a
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: LV	
			Reviewed on: 04/28/2016	
			Updates:	
			Recommendation:	
			File 22- Lang	

Petition for Appointment of Temporary Conservator of the Person and Estate

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 4/26/16. 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on the Proposed Conservatee, Gilberto Artega Medrano. 3. Need proof of service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on all relatives listed at #11: - Helen Sandoval, Spouse - Agripina Medrano, Sister - Francisco Medrano, Brother - Nefina Arteago, Sister - Benjamin Lopez, Son - Enrique Lopez, Son - Josephina Lopez, Daughter - Gilbert Medrano, Son Note: Notice of Hearing filed 5/2/16 indicates that the Notice of Hearing was served by mail on 4/27/16, but does not indicate that a copy of the temp petition was included with the service. 4. The Court may require clarification re the request for conservatorship of the estate with reference to Local Rule 7.15.4., which states that when the only asset of a proposed Conservatee is public benefits, conservatorship of the estate is not required. 5. If granted, bond will be required in the amount of \$11,880.00, which includes cost of recovery pursuant to Probate Code §2320(c) and Cal. Rule of Court 7.207.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/o
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/28/16	
			Updates: 4/29/16, 5/2/16	
			Recommendation:	
			File 23- Medrano	